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ABSTRACT

The OCLC Interlibrary Loan (ILL) Communications Subsystem provides participating libraries with on-line control of ILL transactions. This user manual includes a glossary of terms related to the procedures in using the system. Sections describe computer entry, searching, loan request form, loan response form, ILL procedures, the special message feature, and system error checking. (KP)

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INTERLIBRARY LOAN COMMUNICATIONS SUBSYSTEM: USERS MANUAL

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

PRELIMINARY DOCUMENT

September 1976

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NOTICE

This PRELIMINARY DOCUMENT, dated September 1976, reflects the proposed manner in which the Interlibrary Loan (ILL) Communications Subsystem will operate when made operational during 1977. Comments and questions by Ohio and Independent libraries should be forwarded to Phyllis Bova, Library Systems Division, Ohio College Library Center; Network libraries should forward comments to their respective network offices.

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I. INTRODUCTION

The OCLC Interlibrary Loan (ILL) Communications Subsystem provides participating libraries with on-line control of interlibrary loan transactions. ILL provides libraries with the on-line capability to:

1. request loans and receive responses to the requests;
2. transmit messages;
3. maintain complete, accurate records of all loaned and borrowed items;
4. automatically check due dates;
5. issue overdue notifications for the lending and borrowing libraries; and
6. automatically refer a loan request to the potential lending libraries which are specified by the borrowing library.

An ILL record consists of two screen records: The first screen displays the Loan Request Form and the second screen displays the Loan Response Form (see pp. 67-68).

The Loan Request Form is completed by the borrowing library and contains both fixed and variable length data elements. These elements identify the loan material and provide information necessary for control of the loan request.

The Loan Response Form is completed by the lending library and contains data used by the lending library to control the loaned material. The data contains instructions to the borrowing library on the use and return of the loaned material and dates necessary for maintenance of an accurate loan record.

A message file for each participating library stores incoming loan requests, responses and messages. When a library logs in to the computer, a message is displayed which notifies a library when there are pending messages.

The ILL subsystem also provides an ON-Line Transaction File which stores incomplete loan transactions. In this way, libraries can maintain accurate records of all items they have borrowed and/or loaned.

II. GLOSSARY

Abbreviated Entry	See "Truncated Entry Display" and "Summary Screen".
Authorization Level	Indication of the maximum range of transactions an individual operator is permitted to perform. The level at which an individual operator is authorized to function within a given subsystem. In ILL an operator with a "full" authorization level can perform all necessary tasks within ILL whereas an operator with a "partial" authorization level can perform only specified tasks.
Authorization Number	A unique identification number assigned to an individual terminal operator, that identifies to the computer, the operator, the operator's institution, and the level of activity permitted the operator within each subsystem.
Ƀ	A symbol used to denote a blank space, when a blank space conveys information (e.g., in a fixed field element) or when a space is required in the record format such as the space preceding and following a subfield code. Ƀ does not display on CRT screen.
Bibliographic Record	Cataloging information for one bibliographic item (e.g., for one serial or monograph title). An on-line bibliographic record is the equivalent of an entry in a card catalog.
Cancellation Message	A system-generated message used to notify the lending library when the borrowing library has cancelled a loan request which is being processed by the lender.

Command	An electronic signal or set of signals which cause the computer to start, stop, or continue a preprogrammed operation. A signal or set of signals that initiates a specific machine function.
CRT Terminal	Cathode Ray Tube terminal, a type of terminal similar to a television set with a keyboard for entering data.
Cursor	A symbol that indicates the screen position of the next character to be typed. On an OCLC Model 100 terminal, the cursor symbol is a blinking rectangle; on a Spiras LTE terminal, the cursor is a blinking vertical line.
Data Element	A unit of information, e.g., place of publication. In an ILL record, each element is identified by a mnemonic tag; e.g., "CALLNO" (call number), "AUTHOR" (author of the loan material), "RETNIN" (return instructions), "LNRSTR" (loan restrictions).
Delete	The action of removing data from the on-line system, either removing information from a record or removing an entire record.

Delimiter	A special symbol used to separate data elements in an on-line record. Depicted as a double dagger (‡), a delimiter always immediately precedes a subfield code.
Double Dagger	See Delimiter.
Field	A collection of data elements treated as a single unit. There are two types of fields: fixed and variable.
Field Terminator	A symbol that appears at the end of a field to distinguish the end of the field from the beginning of the next field; depicted as a paragraph mark (¶).
Fill Character	A character displayed where a specifically required character is missing. On the OCLC Model 100, the fill character appears as a solid rectangle; on the Spiras LTE, the fill character appears as a blinking underscore.
Fixed Field	A field in which data elements are limited to a prescribed number of characters and must appear in fixed relative order.
Format	The framework of fixed and variable fields within a record.
Heading	Data elements extracted from a bibliographic record for display along with local information in an ILL record.
Holdings	Display of institution symbols on bibliographic records that

	indicates which OCLC participants hold a copy.
Home	The position at the upper left corner of the CRT terminal screen where an operator usually enters commands and messages to the central computer system.
Illegal Character	A character that is not defined within the context that it has been applied (e.g., ‡x in field 245; code z in fixed field element "copy"; Greek character in standard character set).
ILL Record	A two-screen display containing information about one interlibrary loan transaction. Screen #1 contains the borrowing library's request; screen #2 contains the lending library's instructions concerning the loan. Each ILL record provides information needed by the lending and borrowing libraries to control loan requests.
ILL Workform	An outline of an Ill Request Form that is completed by an operator to initiate a new loan request. The ILL workform is displayed by entering 'wfi' in the home position and depressing the DISPLAY REC'D and SEND keys.
ILL Transaction	Any on-line activity regarding an interlibrary loan; e.g., generating a loan request or response and updating a record for loan control.
Index Entry	A data element (search key) used to identify the location of a record in the computer file.
Index File	A collection of search keys derived from a specific class of data elements (e.g., "title") with pointers to all records that correspond to each search key.

Indicator	A one-character numeric code that supplies information about a variable field in addition to information derived from the tag. At this time, indicators are not defined for the variable fields of an ILL record but appear only in a bibliographic record. On the bibliographic record display 1 or 2 indicators may appear between a variable field tag and the contents of the field.
Institution Symbol	A three-character code assigned by OCLC to identify an individual participating library or institution.
Legal Character	Any character assigned a specific value or function in a given field or character set.
Level Designator	A four-character code identifying each level of operation on the OCLC system. Each operation level permits the operator to perform a specific range of transactions.
Log-In	The entering of an authorization number and a level designator identifying the terminal operator and specifying the subsystem that the operator will use. No transactions are possible on the OCLC system until the operator has logged in.
Machine Readable	Data represented in a form that can be "read" by a computer.
Message Waiting File	A file which stores incoming interlibrary loan messages for each participant. These messages may include new loan requests, responses to requests, or system-supplied communications concerning current status of a loan.

Message Waiting File Summary Screen	A display that is part of the ILL log-in message notifying participants of pending loan requests, responses, renewals, overdues, cancellations, and special messages. The summary screen contains the type and number of pending ILL messages in a participant's message waiting file. The summary screen may be displayed by entering 'mf' in the HOME position and depressing the DISPLAY REC'D and SEND keys.
On-Line	Operation of a system in which the user enters input data into the computer directly from the point of origin and/or the computer transmits output data directly to the point of use.
On-Line Catalog	A collection of bibliographic information composed of distinct units (RECORDS); stored in machine-readable form and accessible on-line.
On-Line Transaction File	On-line storage file for records of each library's uncompleted interlibrary loans.
Paragraph Mark	See Field Terminator
Produce	A produce command is initiated by depressing the PRODUCE and the SEND keys. In the ILL subsystem this command directs the computer to dispatch a loan request to a lending library or a loan response to the borrowing library.
Record	A collection of fields treated as a unit. A "bibliographic record" represents cataloging information for one monographic or serial title.

Reformat	A command to the system to reassemble fields appearing on the screen. When the operator gives a reformat command, all fields that have already been sent will be re-displayed, incorporating any changes that the operator may have made in the record format. The operator reformats a record by entering the letters 'rf' and depressing DISPLAY REC'D and SEND keys.
Request Form	Screen #1 of the ILL record display containing the bibliographic identification of the loan item, and special information input by the borrowing library.
Response Form	Screen #2 of the ILL record containing loan instructions for the borrowing library and information necessary for control and return of a loan item.
Retrieval	The action of calling a record out of the on-line system for display on a terminal screen.
Search Key	A formatted group of characters used to identify a record for the retrieval from the on-line system. Search keys are generated from field in the record, e.g., from ISSN (field Ø2Ø) or title (field 24x).
Send	The transmission of a message, command, or field from a terminal to the system. This is achieved when the operator depresses the SEND key.
Start-of-Message	A symbol that precedes any message or field sent to the computer system; depicted on the terminal screen as a solid triangle (▶). There is a permanent start-of-message in the HOME position which does not display.

Subfield Code	A lower-case alphabetic character immediately following a delimiter to identify a data element within a variable field in the on-line catalog.
Tag	In bibliographic records, a three-digit numeric label that identifies a variable field (e.g., 245).
Terminal	An input/output device on which an operator enters and receives data from an on-line computer system.
Truncated Entry Display	A display of essential data from a bibliographic record. This essential data (author, title) identifies individual bibliographic records (or ILL records) when more than one record is retrieved by a search key.
Update	A command that signals the computer to record changes in an ILL record in the On-Line Transaction File. An update command is initiated when the UPDATE and SEND keys are depressed.
Variable Field	A field whose length cannot be predetermined (e.g., main entry, title, call number). A variable field may consist of one or more elements.
Workform	An outline of a record format that is to be completed by an operator to enter a new record into the On-line catalog or a new loan request in the ILL subsystem.

III. COMPUTER ENTRY

To enter the OCLC on-line system, an operator must log-in to the computer. A complete log-in command is formatted as:

NNN-NN-NNNN,ssss (SEND)

where NNN-NN-NNNN is an operator's authorization number, ssss is his level designator, and SEND is the SEND command.

An authorization number and level designator are always entered at the Home position on the terminal screen. After these are typed, the SEND key is depressed.

A. Authorization Number

Each participating library must supply OCLC with information on each individual who will operate the on-line system. The necessary information includes the individual's full name, short name or initials (seven characters maximum), the subsystem(s) he is authorized to operate, and the maximum authorization level within each subsystem at which he can work. OCLC will then assign a unique identification number to that individual. This number becomes his authorization number, e.g., ØØØ-ØØ-ØØØØ. Individuals authorized to use more than one OCLC subsystem are assigned a separate authorization number for each subsystem.

B. Authorization Level

Level Designator	Level	Capabilities
srch	Search	*retrieve ILL records belonging to operator's institution; i.e., institution is either the borrower or the lender.
part	Partial	*retrieve ILL records belonging to operator's institution; i.e., institution is either the borrower or the lender. *alter data elements to maintain ILL records for operator's institution.

full	Full	*retrieve ILL records belonging to operator's institution; i.e., institution is either the borrower or the lender *alter data elements to maintain ILL records for operator's institution *dispatch loan request, responses, renewals and special messages *cancel loan requests and special messages

C. Computer Response

The operator's short name or initials (up to 7 characters) will appear in the computer response to the log-in command. When the system has successfully identified the authorization number it will respond with a greeting and a list of pending messages in the library's Message Waiting File. For example:

Good Morning, Joe
You will be using the ILL Communications System in the full mode.
You have the following messages in your 'message waiting' file:

▸1 2 loan requests
▸2 2 loan responses
▸3 2 loan renewals
▸4 2 overdue
▸5 2 special messages
▸6 2 canceled loans

The system will also display summaries of messages for other subsystems if they are available.

The messages will always display in the above order: loan requests are line number 1, loan responses are line number 2, etc. If there are no pending messages of a certain type, the system will display a zero before the message type, e.g.,
▸6 Ø canceled loans.

D. Changing Subsystems and Levels

After logging in to a particular OCLC subsystem, an operator can change levels within the subsystem or can log in to a different subsystem. To do this, he re-enters his authorization number for the new subsystem and/or his level designator. As long as

the operator uses the same authorization number, it is not necessary to log off before switching subsystem levels.

As with the initial log-in, the system recognizes an authorization number only for use in subsystems and at levels where it is validated.

E. Logging-Off

When an operator has finished using the system or leaves the terminal at any time, he should log off. Leaving a terminal "logged-in" could lead to entry of or changes in records by unauthorized persons.

To log off, enter the letters "end" at Home position and depress SEND. When the message has been received, the computer will respond:

Good-bye.

IV. SEARCHING

After logging-in to the ILL communications subsystem, the operator may search any one of three files maintained by the system. These files are:

1) the OCLC On-Line Union Catalog
2) the ILL On-Line Transaction File
3) the Message Waiting File

Records for each file are retrieved by search keys. The format and construction of the search key identifies which of the three files is being accessed. When a search key is entered, the system searches the appropriate file for all records that correspond to the search key. Procedures for entering search keys are described in this chapter.

A. OCLC On-Line Union Catalog

To search the OCLC On-Line Union Catalog, the user enters a search key constructed or derived from one of the following data elements:

OCLC control number (OCLC no.)
Library of Congress card number (LCCN)
International Standard Serials Number (ISSN)
International Standard Book Number (ISBN)
CODEN
Personal or corporate name
Title
Name/title

Refer to Addendum No. 4 to On-Line Cataloging for a detailed description of the various search techniques.

B. ILL On-Line Transaction File

The ILL On-Line Transaction File stores the ILL records of each participating library. These records provide a library with control of its lending and borrowing transactions and permit on-line maintenance of interlibrary loan requests. Libraries may retrieve only the ILL records for loan transactions in which they are the borrowing or lending institution. ILL records remain accessible on-line until they are canceled or until the lending library has acknowledged return of the loan item by completion of data element CLRD on the response form (see p. 67).

A user retrieves an ILL record from the On-Line Transaction File when he enters a search key constructed or derived from one the following data elements:

Interlibrary loan control number
Call number
Borrowing library symbol
Lending library symbol
Title of the loan material
Name/title of loan material
Patron name or identification number

Each data element type corresponds to an index which is accessed by a uniquely formatted search key. The operator enters the appropriate search key in the Home position and depresses the DISPLAY REC'D and SEND keys.

Following is a description of each index and examples of how to search it.

Interlibrary loan control number

The ILL control number is a sequential number assigned to each ILL record by the subsystem. It appears in the heading of the ILL record.

To search by ILL control number, the user enters the control number preceded by the mnemonic code IL=, e.g.,

IL=761000

Call number

The call number field, CALLNO, is displayed on the loan request form of an ILL record. It provides the lending library with call number identification and assists in its retrieval of loan material.

To search by call number enter the mnemonic code CN=, followed by the first eight alphabetic and/or numeric characters of the call number. Exclude decimal points and blank spaces. If the call number is less than eight characters long, enter the entire call number. For example:

Call Number in ILL Record	Search Key Construction
PZ1034.1 .C45 1945	CN=PZ10341C
HD34 .T25 M19 1967	CN=HD34T25m
800.985 Cor	CN=800985Co
Fic Try	CN=FicTry

Borrowing institution/lending institution

The borrowing institution/lending institution indexes enable users to access ILL On-Line Transaction File records for materials they have lent or borrowed.

The generalized structure for the borrowing/lending search key is: the borrowing library's or lending library's institution symbol, preceded by the mnemonic code, LI= or BI=, respectively. The association format of the search key indicates which ILL records are retrieved.

In the following examples, YYY indicates the OCLC institution symbol of an ILL subsystem participating library other than the operator's.

Search Key	ILL Records Retrieved
LI=YYY	all items currently on loan from library YYY
BI=YYY	all items currently borrowed by library YYY

The subsystem does not permit the operator to retrieve the ILL record(s) of other participating libraries. When an operator enters an illegal institution code -- one which his library has neither lent to nor borrowed from -- the system will reply:

Request impossible.

Title (ILL record)

The title index search permits participants to access the On-Line Transaction File by the title of the loan material. This search key is based on the first four words of field "TITLE" in the ILL record and excludes initial English articles "a", "an", or "the".

The title search keys for interlibrary loan and bibliographic records (in the OCLC On-Line Union Catalog) are constructed in exactly the same manner. A two character mnemonic code TI= precedes the title search key and signals a search of the ILL transaction file; the absence of the mnemonic code signals a search of the On-Line Union Catalog.

To search the On-Line Transaction File by title, the operator inputs the mnemonic code TI=, followed by the first three letters of the first word, the first one or two letters of the second and third words, and the first character of the fourth word. A title search must always contain three commas to distinguish it from other search keys. The three commas separate the four derived character strings. If there are not four words in the title, the commas are still present, one after the other. If the first word does not have three letters, enter the number of letters available. For more details on the title search, refer to Addendum No. 4 to On-Line Cataloging.

The following are examples of title index searches for ILL records:

ILL record	Search Key
TITLE: D.H. Lawrence review	TI=d,h,la,r
TITLE: Gone with the wind	TI=gon,wi,th,w
TITLE: Lady	TI=lad,,,

Name/title

The name/title index search permits the operator to access ILL records by the author and title of the loan item. This search key is based on the first word of the author main entry from the AUTHOR field, e.g., personal author's surname or first word of corporate or conference name, and the first word of the title from the TITLE field (excluding initial articles).

The construction of name/title search keys for ILL records and bibliographic records are similar. The two-character mnemonic code NT= precedes the search elements and indicates a search of the On-Line Transaction File.

To search the On-Line Transaction File by name/title, the operator enters the mnemonic code NT= followed by the first three or four letters of the author main entry and the first three or four letters of the first word of the title. A comma separates the name and title portions of the search key.

Name and title in ILL record	Search Key
NAME: Tryon, Thomas TITLE: Harvest Home	NT=tryo,harv

NAME: American Library Association
TITLE: A.L.A. Handbook on Organization NT=amer,ala

Patron name or identification number

The patron index search permits interlibrary loan staff of the borrowing library to retrieve all ILL records requested by or on loan to a given library patron and uses either the patron's name or identification number. This depends on the entry in element "PATRON" on the Loan Request Form.

The patron name index search is constructed like the personal name main entry search key used for retrieval of bibliographic records. A two-character mnemonic code PA= precedes the search key elements and indicates a search of the ILL On-Line Transaction File. To search by patron name the operator enters the mnemonic code PA= followed by the first four letters of the patron's last name and a variable pattern of his first name and/or middle initial. Patron name search keys may reflect the following patterns, where the numerals represent the number of characters taken from each succeeding word:

4,1 4,3,1 4,3 4,2 4,2,1 4,1,1

Examples of patron name search:

Patron name from ILL record	Search Key
Jones, Joe J	PA=jone,joe,j
Jones, Joe	PA=jone,joe
Jones, JJ	PA=jone,j,j

The patron ID index search uses the patron's identification number. To search by patron ID number, the operator enters up to fifteen characters of the patron ID preceded by the mnemonic code PN=. Examples of patron ID search are:

Patron ID in ILL record	Search Key Construction
PATRON:103-40-8790	PN=103-40-8790
PATRON:CC44467989	PN=cc44467989

When an operator has entered one of the above index search keys, the subsystem searches the On-Line Transaction File for all ILL records that correspond to the search key. Three possible results of the search are:

1) no ILL record is retrieved;
2) a single ILL record is retrieved;
3) multiple ILL records are retrieved.

No ILL record

If no ILL record of the operator's institution corresponds to the search key, the computer will respond with the message:

No ILL record

The operator should then try other search keys. This message may, however, mean the ILL transaction has been completed or canceled and is no longer active.

Single ILL record

If a single ILL record responds to a search key, the system will display that record.

Multiple ILL record

When two or more ILL records respond to the search key, the system constructs a list of truncated entries which contain the following data. The entries are line numbered for later retrieval.

1) The author (AUTHOR) and title (TITLE) of the loan item. If the loan item is a serial, the title of the periodical (TITLE), the volume (VOL) and the date (DATE) appear in the truncated record.

2) The OCLC control number (OCLC#) of the item

3) The patron's identification (PATRON)

4) The symbol which defines the role (BI: or LI:) of the other library in the loan transaction

If more than 256 entries respond to a search key, the system does not display a list of truncated entries; instead, it responds, 'more than 256 entries respond to this search key'. The operator should attempt to retrieve the ILL records using a different search key.

Truncated entries are listed alphabetically by the author or by the title if there is no author.

To retrieve an ILL record for a truncated entry, the operator enters the appropriate line number in the Home position and depresses the DISPLAY REC'D and SEND keys.

The following examples are for a patron name search of the On-Line Transaction File. The operator input PA=jone,j and depressed the DISPLAY REC'D and SEND keys.

1 Coe, MD The Maya. 362999 Jones,J. SATISFIED
LI: KSU
2 Historia Mexicana V.2 1955 833659 Jones,J.
SHIPPED LI: OUN
3 Thompson,J. The rise and fall of Maya
Civilization. 420187 Jones,J. IN PROCESS AT AKR
LI:AKR

Line numbers 1 and 3 are sample truncated entries of loans for books; truncated entry number 2 is for loan of a serial publication.

C. Message Waiting File

The Message Waiting File functions like an on-line mailbox in that it stores incoming interlibrary loan transactions and messages for each participating library. ILL participants may retrieve messages for their own institution only.

The system provides a message file summary display with the ILL log-in greeting. The message file summary presents an inventory of the institution's pending ILL messages from the Message Waiting File by the type and number of pending transactions.

The message file summary display contains six entries for the various types of pending messages which are held in the Message Waiting File. These entries are: loan requests, loan responses, loan renewals, overdues, canceled loans, and special messages. Each entry is preceded by a line number; the number which follows the line number indicates how many messages of that type are pending. If no messages are pending, a zero will follow the line number. For a sample message file summary display, see the sample ILL log-in in the first chapter.

To retrieve pending messages, the operator enters the appropriate line number and depresses the DISPLAY REC'D and SEND keys.

To re-display the message summary screen, the operator enters 'mf' in the Home position and depresses the DISPLAY REC'D and SEND keys.

When the operator enters the desired line number on the message file summary screen, the system responds by displaying one of the following:

1) a single ILL record;
2) a single special message;
3) a single cancellation message;
4) a list of truncated entries for ILL records or special messages;
5) a list of multiple cancellation messages.

Again, each entry is given a line number.

Single ILL record

If the operator requests display of overdues, loan requests, loan responses, or loan renewals and only one message is in the 'message waiting' file, the system displays the ILL record for that message.

Single special message

If the operator requests the display of special messages and only one special message is in the Message Waiting File, the system displays that message.

Single cancellation message

If the operator requests the display of cancellation messages and only one message is pending, the system displays the cancellation message. Cancellation messages contain the ILL control number of the canceled loan request, the status CANCELED or EXPIRED, the DATE that the system will delete the canceled ILL record and its cancellation message.

Truncated entries

When two or more pending messages respond to a display request for loan requests, responses, renewals, overdues or special messages, the system constructs a list of truncated entries for the records that contain the requested type of message.

Truncated entries for loan requests, renewals, responses, and overdues contain the interlibrary loan control number (ILL#), the status of the loan (STATUS), and the OCLC control number (OCLC#) of the bibliographic record used to create the loan request

and a date. The date supplied in each truncated entry depends on the status of the loan. The dates supplied in truncated entries are:

Message displayed	Status	Date supplied
loan requests	Pending At XXX	REQDAT (request date of the loan)
loan responses	Satisfied	date lender input 'yes' in WILSUP (will supply)
	Shipped	ESTDEL (estimated delivery date)
	Unfilled No Retry	EXP (expiration date of loan)
loan renewals	RENEWAL OK	date lender entered RENDAT (renewal date)
	RENEWAL Not OK	DUEDAT (due date)
overdue	OVERDUE AT XXX	either: 1) ESTDEL (indicating loan item overdue at borrowing library), or 2) ERTDAT (estimated return date - indicating loan return overdue at lending library. XXX indicates the institution symbol of the library where the loan is overdue.

Truncated entries for loan requests, responses, renewals and overdues are listed by ILL control number.

The truncated entries for special messages contain the special message control number, the institution

symbol of the sending library, the date the message was sent and the system deletion date. These truncated entries are listed in numeric order by the special message control number.

Table 1 contains sample formats for each of the pending messages.

Table 1
TRUNCATED ENTRY DISPLAYS: Message Waiting File

1) Loan requests:

	ILL#	STATUS	OCLC#	Date
▸1	7603000	PENDING AT OSU	200000	REQDAT: 760201
▸2	7604000	INPROCESS AT OUN	30010	760301

2) Loan responses:

	ILL#	STATUS	OCLC#	Date
▸1	7603100	SHIPPED	21000	ESTDEL: 760302
▸2	7604100	SATISFIED	31000	760304

3) Loan renewals:

	ILL#	STATUS	OCLC#	Date
▸1	76011000	RENEWAL OK	88888	RENDAT: 760330
▸2	76011100	RENEWAL REQ	100100	760406

4) Overdue loans:

	ILL#	STATUS	OCLC#	Date
▸1	7602000	OVERDUE AT OSU	77667	ERTDAT: 760227
▸2	7602110	OVERDUE AT OCL	198445	ESTDEL: 760301

5) Special messages:

	SM#	SENDER	DATE	DELDATE
▸1	7610000	KSU	760304	760311
▸2	7620000	OUN	760319	760326

6) Cancelled loans:

	ILL#	STATUS	Deletion date
▸1	769898	CANCELLED	760415
▸2	768905	EXPIRED	760520

Multiple cancellation messages

When the operator requests the display of cancellation messages and more than one message is pending, the system displays a list of cancellation messages.

Each message contains the ILL control number of the canceled loan, the status CANCELED, the date that the system will delete the ILL record from the canceled loan request and its cancellation message from the on-line system. (See Table 1)

Multiple cancellation messages are arranged by the system deletion date. A more detailed description of cancellation messages is given in Chapter VII.

To retrieve an ILL record or special message from a truncated entry or canceled loan transaction display, the operator enters the line number of the entry and depresses the DISPLAY REC'D and SEND keys. The operator may retrieve another entry when he enters the line number of that other entry and depresses the DISPLAY REC'D and SEND keys. To re-display the list of truncated entries, the operator inputs 'ps' in the Home position and depresses the DISPLAY REC'D and SEND keys.

V. DESCRIPTION OF LOAN REQUEST FORM

The ILL request form contains 35 data elements arranged within logical groups. These logical groups are:

1) Heading
2) Bibliographic data
3) Notes
4) Loan transmittal data
5) Renewal data

Start-of-messages (▶) and field terminators (¶) are displayed on the ILL Request Form. The 35 data elements may be sent to the computer all at one time or as individual elements. See Fig. 1.

A. Heading

The first three lines of the Loan Request Form contain ten data elements which identify the ILL record.

ILL# BI: OCLC# REQDAT: EXP:
WILSUP: RETRY: DUEDAT: STATUS:
LI:

CALLNO:
AUTHOR:
TITLE:
IMPRNT: ED: VOL:
ARTL:
DATE: PAGES: NO: VERIFY:

NOTES:

MAXCST: SHPVIA: BIFUND:
PATRON:
SHIPTO:

BILLTO:

REC'D: RTNDAT: ERTDAT: VIA:

INSUR:

RENEWL: RENDAT:

Fig. 1. Loan Request Form.

Following is a description of each of the items in the Heading.

ILL#

Interlibrary loan control number. Sequential number assigned automatically by the system. This number may not be altered by the user.

BI

Borrowing institution. Three-character OCLC symbol of the borrowing library. This element is supplied by the system when the borrowing library creates the loan request form.

OCLC#

OCLC control number of the bibliographic record used to create the loan request form. This element is either system supplied or blank (if there is no bibliographic record in the On-Line Union Catalog for the desired loan item).

REQDAT

Request date of the loan. The system supplies this date at the time the operator creates the loan request form. The format of the date is: yymmdd, where "yy" represents the last two digits of the year, "mm" represents the numeric identification of the month, and "dd" represents the number of the day. For example, 23 March 1976 would appear as:

REQDAT: 760323

EXP

Expiration date of loan. Date by which the patron requires the loan material. The borrowing library enters either a date, or a number of days, or leaves the element blank.

To indicate the expiration date of the loan, the borrowing library may input a six digit number in the yymmdd format. For example, if the expiration date is 12 March 1976, the operator inputs:

EXP: 760312

If the loan request must be satisfied within a specific number of days to be useful to the patron, the operator enters the number of days preceded by a plus sign. The operator may enter a one, two, or

three-digit number. For example, if the loan request must be satisfied within three weeks, the operator inputs:

EXP: +21

The system adds this number to the request date and displays the result in the yymmdd format when the ILL record is reformatted. Using the above example, if the date in REQDAT were 760301, the system would display:

EXP: 760322

If the operator leaves this element blank, the system supplies a default expiration date of 30 days from the date of request.

If a loan request has not been satisfied by the expiration date, the system generates a cancellation message in the borrowing library's message waiting file. These messages are grouped in the loan cancellation category (item number 6 of the Message File Summary Display) and contain the status indicator EXPIRED. Expired loans are deleted from the on-line system seven calendar days following the expiration date.

The system checks EXP for input errors (see Chapter IX).

The system does not permit the lending library to change element EXP.

WILSUP

Will supply. The lending library enters "yes" or "no" in response to the loan request.

yes - Lending Institution (LI) will satisfy the loan request.

no - LI will not satisfy the loan request. System automatically refers this request to another potential LI.

If the operator enters a response other than those defined above, the system responds:

Message not clear.

RETRY

Retry date. Date input by a potential lending library to indicate that it cannot fill the loan request at the present time but may be able to fulfill it on the date indicated.

The lending library enters a retry date using the format yymmdd, or enters the number of days after which the request should be retried (see examples under EXP above).

The system treats a RETRY reply as a negative response (a "no" in WILSUP), but stores the LI and Retry Date until the loan request has been satisfied or until all other potential lending institutions have been queried.

The system automatically retries a lending library that entered a RETRY response when the retry date is reached if:

1) all potential lending libraries entered in element LI have been unable to satisfy the request, and

2) the expiration date (EXP) has not lapsed.

The system checks RETRY for input errors (see Chapter IX).

DUEDATE

Due date of loan. Date input by the lending library that indicates the date by which the loan item should be returned to that library. If the supplied material need not be returned, e.g., when photocopy is sent, the lending library inputs "none" in element DUEDAT.

The lending library enters a due date for the loan using either the format yymmdd, or the number of days of the loan (see examples under EXP above).

The system checks DUEDAT for input errors (see Chapter IX).

STATUS

Current status of loan request. The system supplies one of fourteen status indicators in this field.

Each STATUS indicator is triggered by the input of data in elements of the Request or Response forms. The status indicators are:

STATUS	Explanation
PENDING AT XXX	Loan request is pending unprocessed in the message file of a lending library. The system sets STATUS to PENDING AT XXX when the borrower sends a new loan request. Loan requests remain pending for four days.
IN PROCESS AT XXX	Loan request is being processed by lending library XXX. The system sets STATUS when the potential lending library retrieves the ILL record for a loan request from its message file. "PENDING AT XXX" changes to "IN PROCESS AT XXX."
SATISFIED	Lending library has entered 'yes' in WILSUP element of the request form but has not entered a shipping date in DATSHP on the loan response form. The system displays only the OCLC symbol of the lending library which entered "yes" in WILSUP.
SHIPPED	Loan item has been shipped to borrowing library. The system sets STATUS to "SHIPPED" when the lending library enters a date in element DATSHP on the Loan Response Form.
RECEIVED	Borrowing library has received the loan item. The system sets the STATUS element to "RECEIVED" when the borrowing library enters a date in element REC'D on the loan Request Form.
RETURNED	Borrowing library has returned the loan item to the lending library. The system sets the STATUS to "RETURNED" when the borrowing library enters the return shipping date in element RTNDAT of the Loan Request Form.

RENEWAL REQ	Borrowing library is requesting a renewal of the loan due date. The system sets the status to "RENEWAL REQ" when the borrowing library enters a renewal request in the renewal field (RENEWL) of the Loan Request Form.
RENEWAL OK	Lending library has granted a loan renewal to the borrowing library. The system sets the STATUS to "RENEWAL OK" when the lending library enters a (renewal) date in element RENDAT of the Loan Response Form.
RENEWAL NOT OK	Lending library has responded negatively to a loan renewal request. The system sets the STATUS to "RENEWAL NOT OK" when the lending library enters "no" in RENDAT on the Loan Response Form.
RETRY	Loan has not been filled by any of the potential lending libraries, but at least one lending library entered a date in the RETRY element of the REQUEST FORM. The ILL request will remain active and wait for the retry date unless the borrowing library enters a new string of lending library symbols. If a new string of lending library symbols is entered, the system will disregard the retry responses. When the RETRY date is reached, the system will dispatch the loan request to the potential lending library which entered the earliest RETRY date.
UNFILLED NO RETRY	No potential lending library could satisfy the loan request and no date was entered in RETRY. The borrowing library should enter new potential lending libraries in element LI or cancel the loan request (see p. 55).
OVERDUE AT XXX	Loan is overdue indicating possible loss in shipping

between the lending and borrowing libraries. XXX is the OCLC symbol of the library which should have received the loan item. The system sets the loan status to overdue if:

1) Borrowing library has not entered a date in REC'D on the Loan Request Form seven days after the ESTDEL (estimated delivery date) entered by the lending library has expired or,

2) Lending library has not entered a date in CLRD on the Loan Response Form seven days after the ERTDAT (estimated return date) has expired.

The system notifies both libraries by placing an overdue message for the loan in their Message Waiting Files.

CANCELED — Borrowing library has canceled loan request in process with a potential lending library.

EXPIRED — Loan not satisfied before the EXP date arrived.

LI

Lending institution(s). OCLC institution symbols for potential lending libraries. The data in LI is input by the borrowing library and may contain a maximum of five OCLC institution symbols. For example:

LI: osu,ksu,kuk,fin,cin

The borrowing library enters each institution symbol separated by a comma so the loan referral can occur. The first potential lending library must respond negatively to the loan request (or the four-day pending period must expire) before the request is referred to the next potential lending library.

In the above example, The Ohio State University (osu) would receive the loan request first and would have to input "no" in WILSUP, a date in RETRY, or allow the request to remain pending for four days with the status "PENDING AT OSU" before Kent State University (ksu) would receive the loan request.

When a lending library responds "yes" to a loan request, the system displays only that library's symbol in element LI.

The system does not permit the borrowing library to input more than 5 OCLC symbols for potential lending libraries or to enter invalid OCLC institution symbols. If the operator inputs more than five OCLC symbols, the system will truncate the string of symbols to the first five symbols entered.

If the operator inputs an illegal symbol (one which has not been defined by OCLC) the system deletes the illegal data,inserts three fill characters for each invalid symbol and responds with the message, "Illegal data." The operator must replace the fill characters with valid data before dispatching the loan request. If the operator attempts to UPDATE or dispatch a loan request which contains fill characters, the system responds "Request impossible."

Elements ILL#, BI, OCLC#, REQDAT and STATUS are supplied by the system and cannot be entered or changed by either the borrowing or lending library. If the operator attempts to enter or change the data for one of these elements, the system will respond:

Request impossible.

Only the borrowing library can input data in elements EXP and LI. If the lending library attempts to enter or change one of these elements the system will again respond:

Request impossible.

Only the lending library can input data in elements WILSUP, RETRY, and DUEDAT. If the borrowing library attempts to enter or change one of these elements the system will again respond:

Request impossible.

B. Bibliographic data

The eleven data elements displayed on the six lines that follow data element LI contain the bibliographic description and the call number of the loan item. Data elements AUTHOR, TITLE, IMPRNT, and ED are displayed from the bibliographic record used to create the loan request. Data element VERIFY is system-supplied if a bibliographic record is used to create the loan request. The remaining

elements, ARTL, VOL, DATE, PAGES and NO, are input by the borrowing library. With the exception of CALLNO, the lending library may not change or enter any of the data elements that comprise the bibliographic data. If the lending library attempts to edit one of these fields, the system will respond:

Request impossible.

The bibliographic data elements are described below:

CALLNO

Call number. The local call number is input without subfield codes and may contain blanks to facilitate recognition. The system will index the first eight characters (minus blanks and punctuation) of the call number entered in the ILL record. This element may be entered or changed only by the lending library. Example call numbers are:

CALLNO: PZ1092.2.C5T41966

or

CALLNO: PZ1092.2 .C5 T4 1966

AUTHOR

The system displays the personal author from the 'a' subfield of the 100 field of the bibliographic record. Subfields a, b, c, d, and e are displayed from corporate (field 110) or conference (field 111) main entries. The system does not display delimiters or subfield codes used in the bibliographic record, but separates each element of data with a blank space.

The borrowing library must input the author's name when no bibliographic record exists in the On-Line Union Catalog. The data should not exceed one line of screen display (72 characters) and should be entered according to standard cataloging practice. No subfield codes are used. For example:

AUTHOR: Tryon, Thomas E.

AUTHOR: UN General Assembly 22nd sess., 1967-68. Delegation from the U.S.

(Note that in the above example, United Nations and United States are abbreviated to fit within the 72 character maximum input requirement.)

If the author displayed from the bibliographic record exceeds one line of screen display or if the operator inputs more than one line of data, the system truncates the entry and displays an asterisk and fill character as the last two elements of the author entry. The system also displays the message 'Data truncated ' in the Home position. For more complete detail, refer to Chapters VII and IX.

The information in this data element may be edited or changed by the borrowing library only.

TITLE

This element contains the title of the loan item. The system displays the title from field 245, subfield 'a' and 'b', of the bibliographic record that is used to create the loan request. No subfield codes or delimiters are used. The borrowing library may edit or revise the system-supplied title entry.

The title field is required and must be inputted by the borrowing library if there is no bibliographic record for the loan item in the On-Line Union Catalog.

The data entered in this element is limited to one line of screen display (74 characters). If the title displayed by the system exceeds one line of screen or the operator inputs more than one line of data, the system truncates the entry, places an asterisk and a fill character as the last two characters in the title entry and displays the message 'Data truncated' in the Home position. For complete details refer to Chapters VII and IX.

The system does not permit the lending library to change or edit this element. If the lending library sends a change in the TITLE element, the system responds 'Request impossible' and reformats the screen with the title as originally displayed.

IMPRNT:

Imprint: Data element IMPRNT contains the place, publisher, and date of the loan item. The system displays this information from subfields a, b, and c of field 260 of the bibliographic record. Subfield codes used in the bibliographic record do not display on the loan request form. For example:

IMPRNT: New York, Macmillan, 1975

This data element accepts a maximum of 50 characters. If the data displayed from the 26Ø field exceeds 50 characters or if the operator inputs more than 50 characters, the system truncates the entry and displays an asterisk and a fill character as the last two elements of the entry. The system also places the message 'Data truncated' in the Home position. For complete details refer to Chapters VII and IX.

The information in this data element may be edited by the borrowing library only.

ED

Edition. If present (serials only), the system displays the edition from field 25Ø, subfield 'a', of the bibliographic record. The borrowing library may edit this element to describe the exact edition or alternate editions which would be acceptable. "Any" indicates that any edition of the loan item is acceptable. For example:

ED: 2d
ED: 2d or 3rd
ED: any

VOL

Volume. If a volume designation is required for a set or a series, the borrowing library enters the designation in VOL. Either Arabic or Roman numerals may be used. For example:

VOL: 2
VOL: II

ARTL

Article. The author and title of the article in a serial publication or section of a book is entered in ARTL. The data should not exceed 75 characters or one line of screen display. The operator should enter standard abbreviations wherever possible. The author and title portion of the article are separated by a slash.

For example, if the desired article is "Library support through automation: the California State University and Colleges plan for library automation," by John C. Kountz, the operator would input:

ARTL: J.C.Kountz/Library support through automation:

This information, in conjunction with data in elements TITLE (of journal), VOL, NO, DATES and PAGES should identify the loan request with sufficient precision.

If the operator exceeds the 75-character maximum input for element ARTL, the system will truncate the entry and display the message, "Data truncated" in the Home position. For complete details refer to Chapters VII and IX.

DATE

This element is reserved for the date of the serial publication. To distinguish a nineteenth century or earlier publication from a twentieth century publication, the year must be entered as a four-digit number. Enter element DATE in the format yyyymmdd. For example:

Date of Serial	Entered as
2 May 1963	19630502
12 June 1875	18750612

PAGES

The inclusive pagination in a serial or monograph to be photocopied. For example:

Pages Desired	Entered as
pp. 109-119	PAGES: 109-119
pp. 1-2 and pp. 8-15	PAGES: 1-2,8-15

If the space provided for this element is insufficient, the operator should use the NOTES element to continue the entry.

NO

Number. Issue identification of a serial publication. Arabic or Roman numerals or alphabetic characters may be used.

VERIFY

Source used for verification of the bibliographic description of the loan item. When an On-Line Union

Catalog record is used to create the loan request, the system supplies the following verification codes:

1) OCLC+ If the potential lender's holding symbol is on the record.

2) OCLC- If the potential lender's holding symbol is not on the record.

If a bibliographic record was not used to create the loan request, the operator must enter the source of bibliographic data on the loan request. If the loan citation cannot be verified, the operator must enter "cannot verify". Otherwise, verification should include the title and year of the source of the citation. Wherever possible, libraries should use standard source abbreviations and verification procedures outlined in the ALA Interlibrary Loan Procedures Manual.

C. Notes

This section contains only one data element. The borrowing library uses this element to explain any special instructions or messages which concern the loan request and are not included elsewhere on the request form.

Two lines of screen display are provided for this element. If the operator exceeds the two line maximum input, the system truncates the information to two lines.

D. Loan Transmittal Data

This section consists of elements input by the borrowing library. If the lending library attempts to enter or change one of these elements, the system will respond:

Request impossible.

MAXCST

Maximum cost. The operator enters the maximum charge the borrowing library will pay for the loan.

SHPVIA

Borrowing library's preferred method of shipment for receipt of the loan item. For example:

SHPVIA: air

This would indicate to the lending library that the loan should be shipped airmail. Listed below are the recommended abbreviations:

Symbol	Meaning
1st	1st class mail
ups	United Parcel Service
lr	Library rate
2d	second class
air	airmail
sd	special delivery
airsd	airmail special delivery
rm	registered mail

If the operator leaves this element blank, the system supplies lr (library rate) as a default value.

BIFUND

Borrowing institution fund. Where applicable, the borrowing library may designate the fund used to pay for the interlibrary loan.

PATRON

Name or identification number and status of the patron who needs the loan material. To facilitate searching, the operator enters last name first. Enter an ID number exactly as it appears on identification. When input, the patron's status should be preceded by a slash and follow the last element of the patron's name or ID number. For example:

PATRON: Jones, Jack M/faculty

or

PATRON: 103-47-0303/student

SHIPTO

Mailing address of the borrowing library. The address should be entered as a text string with each line of the address followed by a slash. For example:

SHIPTO: Library-ILL Dept./The Ohio College Library Center/1125 Kinnear Rd./Columbus, Ohio 43212

If the operator exceeds the two line maximum input limit, the system truncates the information to two lines, displays a fill character as the last characater of the address and supplies the message, "Data truncated," in the Home position. For complete details refer to Chapters VII and IX.

BILLTO

Billing address for interlibrary loan charges. The borrowing library enters the billing address as a text string as described in SHIPTO. If the billing and shipping address are the same, enter "same" in element BILLTO.

REC'D

Date of receipt. Date on which the borrowing library received the loan item. The REC'D date is required input and follows the yymmdd format. For example:

REC'D: 760621

The system checks element REC'D for input errors. For details see Chapter IX.

RTNDAT

Return date. Date the borrowing library mailed the loan item to the lending library. The date of return follows the yymmdd format. For example:

RTNDAT: 760712

The system checks this element for input errors. For details see Chapter IX.

ERTDAT

Estimated return date. Date that the loan item is expected to arrive at the lending library. The borrowing library enters the estimated shipping time in this element preceded by a plus sign, e.g., +7. The system adds this number to the date in RTNDAT and displays the result in the yymmdd format after the record is reformatted.

The system checks element ERTDAT for input errors. For details, see Chapter IX.

VIA

Ship via. Method of shipment used to return loan item. The borrowing library enters the method of return shipment using one of the shipping codes enumerated in the description of data element SHPVIA or other accepted shipping acronyms.

INSUR

Insurance. Amount ($) loan item is insured for in return shipment. For example:

INSUR: 10.00

E. Renewal Data

This section contains two data elements. Element RENEWL can be entered or changed only by the borrowing library; only the lending library can enter or change element RENDAT. If the borrowing library attempts to send a change to RENDAT or the lending library attempts to change RENEWL, the system will respond:

Request impossible.

RENEWL

Renewal request. Request for renewal of a loan entered by the borrowing library. To request renewal, the borrowing library may input a desired renewal date in the yymmdd format or a number of days (see examples under EXP). "Any" indicates that any extension of the loan period, is acceptable.

RENDAT

Renewal date. Renewal date entered by the lending library. The system displays the renewal date from the loan response form. For details see the complete description of this data element in next chapter.

Loan Request Workform

The ILL request workform is provided for requests of loan materials not present in the on-line catalog. These items include non-book materials as well as printed items not yet cataloged in the on-line catalog.

After an unsuccessful search of the On-Line Union Catalog, the borrowing operator requests an ILL workform by entering 'wfi' in the Home position and depressing the DISPLAY REC'D and SEND keys.

The ILL workform provides a skeletal display of the loan request form. The system supplies data elements ILL#, BI and REQDAT; all other data elements are entered by the borrowing library. Review this chapter for descriptions and input requirements.

VI. DESCRIPTION OF LOAN RESPONSE FORM

The Loan Response Form (see Fig. 2) contains 22 data elements arranged into the following groups:

1) Heading
2) Charges and loan data
3) Notes
4) Loan shipping data
5) Renewal data.

No start-of-messages (►) or field terminators (¶) will display on the loan response form. All data elements may be sent to the computer at one time, or individual elements may be sent to the computer. For details see Chapter VII.

ILL#: BI: OCLC# REQDAT: EXP:
WILSUP: RETRY: DUEDAT: STATUS:

COST: LIFUND:
CHGBI:
LNRSTR:

NOTES:

DATSHP: ESTDEL: VIA: INSUR:
RETNIN:

RETNTO:

RENDAT: CLRD:

Fig. 2. Loan Response Form.

A. Heading

With the exception of data element LI, the system displays the heading elements of the Loan Request Form on the Loan Response Form. Data element LI does not display on the Loan Response Form. The lending library enters elements DUEDAT and RETRY. For details, review the Heading section of Chapter V.

B. Charges and Loan Data

The four elements that compose this group contain the cost, charge, and loan information. Only the lending library may enter this data. If the borrowing library attempts to enter or change one of these elements, the system responds:

Request impossible.

COST

Costs incurred by the lending library in locating and shipping the loan material.

LIFUND

Lending institution fund. Where applicable the lending institution may designate the fund used to pay for the interlibrary loan.

CHGBI

Charges to Borrowing institution. Any charges assessed to the borrowing library for completion of the loan request. The lending library should enter the total charges including charges for photocopy assessed to the borrowing library.

LNRSTR

Loan restrictions. Any restrictions placed on the use of the loan material. Three lines of screen display are provided for this element. If the operator exceeds the three-line maximum input, the system truncates the data to three lines.

C. Notes

This section contains one data element. The lending library uses this element to record any special instructions or messages which concern the response to the loan request and are not included elsewhere on the response form. This element may be entered

or changed only by the lending library. If the borrowing library attempts to send a change to this element, the system will respond:

Request impossible.

Three lines of screen display are provided for this element. If the operator exceeds the three line maximum input, the computer truncates the data to three lines.

D. Loan Shipping Data

This section consists of six elements input by the lending library. If the borrowing library attempts to enter or change one of these elements, the system will respond:

Request impossible.

DATSHP

Date shipped. The date the lending library shipped the loan item to the borrowing library. The lending library enters this date in the yymmdd format. For example:

DATSHP: 760819

The system checks this element for input errors.

ESTDEL

Estimated delivery date. Date by which the borrowing library should receive the loan item. To complete this element, the lending library enters the number of days estimated for shipping preceded by a plus sign, e.g., +7. The system adds this number to the date in DATSHP and displays the result in the yymmdd format after the record is reformatted. The system checks this element for input errors. For details see System Error Checking in Chapter IX, p.64.

VIA

Ship via. Method of shipment used to send the loan item to the borrowing library. The lending library enters the method of shipment using one of the shipping codes enumerated in the description of data element SHPVIA, or other accepted shipping acronyms.

INSUR

Insurance. Amount item is insured for by the lending library. For example:

INSUR: 10.00

RETNIN

Return instructions. The lending library uses this element to indicate any packaging or shipping instructions which the borrowing library should follow when it returns the loan item. Three lines of screen display have been provided for this element. If the lending library exceeds the three line maximum input, the system truncates the data to three lines.

RETNTO

Return to. The lending library address. The lending library enters the return address as a text string, separating each line of the address with a slash. For example:

RETNO: Library - ILL Dept/The Ohio College Library Center/1125 Kinnear Rd/Columbus, Ohio 43212

If the operator exceeds the three lines of maximum input for this element, the system truncates the information to three lines, displays a fill character as the last character of the address and supplies the message, "Data truncated" in the Home position. For complete details refer to Chapters VII and IX.

E. Renewal Data

This section contains two data elements which are inputted by the lending library. If the borrowing library attempts to enter or change one of these elements, the system will respond:

Request impossible

RENDAT

Renewal date. Lending library enters response to renewal request with "none" or a renewal date.

The lending library may enter a renewal date in the yymmdd format or as a number of days desired for the loan extension (see examples under EXP).

The system checks this element for input errors. For details see Chapter IX.

CLRD

Cleared. Date the lending library received the loan material returned by the borrowing library. This date is required to complete the loan transaction and is entered in the yymmdd format.

The system checks this element for input errors. For details see Chapter IX.

VII. ILL PROCEDURES

ILL Subsystem procedures are divided into three sections. The first section explains methods of transmission of data elements to the computer. The following two sections deal specifically with the borrowing and lending libraries' creation and on-line maintenance of the ILL record.

A. Transmitting Data Elements

The method for data transmission on the Loan Request and Loan Response Forms differs from methods used for transmission of data in a bibliographic record in the OCLC On-Line Union Catalog. The ILL records do not contain fields that must be sent to the computer one at a time. Due to system design, it is possible to transmit additions or corrections to one or more data elements at one time.

To send more than one data element, the operator positions the cursor on the line which follows the last line that contains new data. He then depresses the SEND key. All data elements above the cursor are transmitted to the computer. When the computer has accepted them, it responds with the following message:

Data elements added.

For example, the borrowing library operator completes all data elements on the Loan Request Form for a new loan request. This could include elements of the heading, bibliographic data elements, notes, cost, and shipping elements. To send these elements to the computer, the operator positions the cursor on the line which begins with element REC'D, below the last complete element (SHIPTO). He then depresses the SEND key.

Similarly, when the lending library responds to a loan request, it would complete all elements except RENDAT and CLRD on the Loan Response Form, position the cursor on the line beginning with element REC'D, below SHIPTO, and depress the SEND key. Again the computer responds with the message:

Data elements added.

To transmit a single data element, the operator positions the cursor at the Home position, depresses the INSERT key to put the terminal in the insert mode, enters the mnemonic code of the data element (include the colon), and completes the data element. For example:

REC'D: 760809

To send the element to the computer, the operator depresses the ADVANCE LINE and SEND keys. When the computer has accepted the element it responds:

Element REC'D added.

The system reformats the screen displays of the ILL record after each transmission of additions, corrections,or deletions of data.

B. Borrowing Library Procedures

Creation of new loan request

After logging in to ILL, the borrowing library searches the OCLC On-Line Union Catalog for a bibliographic record for the desired loan item. The search may result in the display of:

1) one bibliographic record
2) multiple bibliographic records for the item desired, or
3) no bibliographic record.

One bibliographic record for the desired item

When a search sequence has retrieved a single bibliographic record for the item needed, the borrowing library compares the record with the loan request citation and selects one to five potential lending libraries from the institution designation symbols at the bottom of the bibliographic record. These symbols will be entered in element LI.

To create the loan request, the borrowing library enters 'wfi' at Home position and depresses the DISPLAY REC'D and SEND keys. Illustrations on pages 67 and 68 show that the data elements displayed from monograph and serial bibliographic records were used to create the loan request form.

If the data in elements AUTHOR, TITLE, or IMPRNT exceeds the maximum allowable length, the system will truncate the information. When truncation occurs in one of these elements, the system will display an asterisk and a fill character as the last elements of the truncated information and display the message 'Data truncated'.

The purpose of the asterisk and the fill character is to alert the operator to the possible need to edit the data and therefore reduce the possibility

of transmitting an ambiguous request. If the system-truncated information does not adequately identify the item requested, the operator must abbreviate the entry in such a way that it will be intelligible to the lending library or enter a note to clarify the entry. The presence of the asterisk in the loan request indicates to the lending library that the entry is abbreviated or truncated, but has been examined/edited by the borrowing library. The operator must replace fill characters with a valid character - probably a blank - before dispatching the loan request.

If the operator attempts to send a loan request containing one or more fill characters, the system will respond:

Request impossible.

Before dispatching the loan request, the borrowing library should complete all applicable data elements in the following groups:

1) Heading: EXP, LI
2) Bibliographic data: ARTL, VOL, DATE, PAGE, NO
3) NOTES
4) Loan transmittal data: MAXCST, SHPVIA, BIFUND, PATRON, MAXCST, SHIPTO, BILLTO

Loan request for item not in the on-line catalog

If a bibliographic record for the item needed does not exist in the On-Line Union Catalog, the operator requests a workform and enters 'wfi' at Home position, then depressing the DISPLAY REC'D and SEND keys. The operator completes the request form with the aid of the procedures described in the above systems. The request form must include the appropriate data and bibliographic description. The operator should check a manual union list to obtain names of potential lending libraries and enter the OCLC symbols for each in element LI.

The operator transmits the loan request to the computer and starts the referral process by depressing the PRODUCE and SEND keys.

Maintenance of ILL record by borrowing library

The borrowing library must update the ILL record to indicate dates of receipt, return, and renewal (if applicable).

Receipt of loan material

When the borrowing library receives the loan material from the lending library, the operator retrieves the loan request record from the on-line system. The operator enters the ILL#, the appropriate search key, depresses the DISPLAY REC'D and SEND keys, enters the date of receipt in data element REC'D on the request form, and sends the element to the computer.

After the system has accepted the data element, the operator must depress the UPDATE and SEND keys to update the record. When the system has accepted the ILL record it will respond:

ILL record updated.

Renewal of a loan request

To request renewal of a loan, the borrowing operator enters the renewal request in data element RENEWL on the request form. For an explanation of this element, see Chapter VI. After sending this data element to the computer, the operator transmits the renewal request to the lending library by depressing the PRODUCE and SEND keys. When the system has accepted the renewal request, it will respond:

Loan renewal sent.

Return of loan item

The borrowing library must update the ILL record when the loan item is returned to the lending library. The operator retrieves the ILL record, and completes the following data elements on the request form: RTNDAT, ERTDAT, VIA, and INSUR. He then transmits these changes to the computer and updates the record by depressing the UPDATE and SEND keys. The system will respond:

ILL record updated.

The return procedures complete the on-line maintenance of the ILL record performed by the borrowing library.

C. Lending Library Procedures

Response to incoming loan request

After logging in to the interlibrary loan subsystem, the terminal operator checks the 'message waiting'

file for incoming loan requests. Next, new loan requests are retrieved, and the bibliographic data to check the availability of the items(s) is transcribed. The system changes the status of a loan request from PENDING AT to INPROCESS AT when the operator retrieves the ILL record for the loan request from the message file.

The system will store new incoming loan requests with the status INPROCESS AT in the Message Waiting File until the lending library has responded to the loan, by entering 'yes' or 'no' in data element WILSUP, or a date in element RETRY.

New loan requests which have the status PENDING AT will remain in the message file for four days. At the end of the four-day pending period, the system refers the loan to the next potential lender.

The operator may retrieve the pending loan request from the Message File or the On-Line Transaction File with one of the message retrieval commands as described in Chapter IV. When the availability of the request has been determined, the operator retrieves the request form and enters the response in element WILSUP or RETRY of the loan request display. The operator may enter:

1) yes (may be for returnable or non-returnable loan material)
2) no
3) a retry date

'yes' (returnable material)

If the lending library can supply the loan material, the operator enters 'yes' in element WILSUP of the Loan Request Form and sends the completed element to the computer.

The operator depresses the PRODUCE and SEND keys to dispatch the loan response. This changes the status of the ILL record from INPROCESS AT XXX to SATISFIED and places a response message in the borrowing library's Message Waiting File. When the system has accepted the transaction, it will respond:

Loan response sent.

The operator requests the response form display after he dispatches the "yes" loan response by entering 'wfr' in the home position and depressing the DISPLAY REC'D and SEND keys.

When the loan material is ready to ship, the operator completes the applicable data elements on the response form, sends the completed elements to the computer, and permanently records the changes by depressing the UPDATE and SEND keys. The system responds "ILL record updated" when it has accepted the transaction. The UPDATE of the ILL record upon completion of element DATSHP causes the STATUS to change to SHIPPED.

'yes' (non-returnable materials)

For non-returnable loan materials, such as photocopy, the operator follows the procedures described above and enters "none" in data element DUEDAT. The system cancels this transaction when the borrowing library enters a receipt date in element REC'D on the loan request form.

'no'

If the lending library cannot supply the loan material, the operator enters "no" in data element WILSUP and dispatches the element by depressing the PRODUCE and SEND keys. When the system has accepted the record, the computer responds:

Loan response sent.

This action will refer the loan request to the next potential lender.

'retry date'

If a lending library cannot supply the loan material at the time it receives the request because the item is in circulation or on loan, the operator may enter a retry date in element RETRY on the Loan Request Form. The operator dispatches the ILL response by depressing the PRODUCE and SEND keys. When the record has been accepted, the computer responds:

Loan response sent.

This action refers the loan request to the next potential lending library.

Response to loan renewal request

After logging in to the Interlibrary Loan Subsystem, the operator may check for any loan renewal request in his library's Message Waiting File.

To respond to a renewal request, the operator retrieves the ILL record and inputs a renewal date or "none" in data element RENDAT. This response must be entered on the Loan Response Form.

After the operator sends element RENDAT to the computer, he dispatches the renewal response by depressing the PRODUCE and SEND keys. When the computer has accepted the transaction it responds:

Loan renewal sent.

This action places the renewal response in the Message Waiting File of the borrowing library which requested the loan renewal.

D. Canceling ILL Transactions

Borrowing library

The system permits the cancellation of a loan request by the borrowing library only if a lending library has not entered "yes" in element WILSUP of the loan request. In other words, the status of the loan request must be either PENDING AT XXX, or INPROCESS AT XXX to cancel a transaction. (The status of a "yes" response is SATISFIED.)

To cancel a pending or in-process loan request, the operator retrieves the ILL record for the loan, enters "cancel" in the Home position of the CRT screen, and depresses the UPDATE and SEND keys. When the system has accepted the transaction, it responds:

Loan request canceled.

Cancelation of a "yes" response

If a lending library has entered a "yes" response in element WILSUP and the borrowing library sends a cancellation request for the loan, the system will respond:

Request impossible.

In this situation, the borrowing library should dispatch a special message to the lending library to request cancellation of the loan. To cancel this transaction, the lending library would first be required to cancel the loan request using the procedures outlined below; the borrowing library then would repeat the cancellation by retrieving the

ILL record, entering "cancel" in the Home position, and depressing the UPDATE and SEND keys.

Lending library

The system permits the lending library to cancel a "yes" loan response only when the STATUS element of the ILL record is set to SATISFIED.

To cancel a SATISFIED loan response, the operator retrieves the ILL record for the loan, enters "cancel" in the Home position and depresses the UPDATE and SEND keys. The system responds "Loan response canceled" when it has accepted the transaction.

The system refers this loan request to the next potential lender in element LI of the loan request form. However, if all potential lenders have responded negatively to the request, the system returns the unfilled loan request to the borrowing library. Unfilled loan requests are placed in the borrowing library's Message Waiting File. The status of unfilled requests may be either UNFILLED NO RETRY or UNFILLED RETRY.

The system does not permit the lending library to cancel a loan response which contains a STATUS other than SATISFIED. If the lending library attempts to cancel a "yes" response other than SATISFIED, the system will respond:

Request impossible.

The lending library should use the special message feature to cancel this type of loan transaction.

Cancellation messages

The system generates cancellation messages for loans canceled by the borrowing library which have the status INPROCESS AT and for loans which have not been filled by a lending library before the expiration date arrives.

Cancelation messages for loans canceled by the borrower are placed in the Message File of the potential lending library which was processing the loan.

Cancellation messages for expired loans are placed in the Message File of the borrowing library which dispatched the loan request.

These messages contain the ILL control number of the canceled or expired loan, the appropriate status (either CANCELED or EXPIRED) and the date that the system will automatically delete the ILL record and cancellation message for the canceled or expired loan.

Cancellation messages for loans canceled while in process remain pending in the lending library's message file for seven calendar days following the loan's cancellation.

Cancellation messages for expired loans remain pending in the borrowing library's Message File for seven calendar days following the expiration date (EXP). At the end of the 7-day pending period, the system deletes the ILL record and cancellation message for canceled and expired loan requests.

VIII. SPECIAL MESSAGE FEATURE

The special message feature (see Fig. 3) permits ILL participants to send and receive loan recalls, requests for price quotations, or other ILL related messages which are not accommodated on the Loan Request or Response Forms. Recipients are notified of pending special messages via the ILL log-in Message Waiting File summary screen display.

A. Format of Special Messages

The special message workform contains one fixed field and one variable field.

Fixed field

The fixed field contains five elements:

1) the special message control number (SM#);
2) the OCLC institution symbol of the library which sent the message;
3) the OCLC institution symbol of the recipient;
4) the date the message was sent;
5) the date that the system will delete the message.

A start-of-message symbol precedes the first element and a field terminator follows the last element.

SM#	This element contains a sequential number assigned to each special message by the system. Special message control numbers are reused on a yearly basis. The first two digits are check digits which represent the current year.
SENDER	This fixed field element contains the OCLC institution symbol of the library which is sending the message. The system supplies this element when the operator requests display of the special message workform.
RECIPIENT	This element contains the OCLC institution symbol of the library which is to receive the message. It is inputted by the dispatching library.

DATE — This element contains the date the message was sent. The system supplies this data element when the special message workform is created. The date is in the yymmdd format.

DELDATE — This element contains the date that the system will delete the special message from the on-line system. The system supplies this date at the time the special message workform is created. To compute the deletion date, the system adds seven calendar days to the date of dispatch, element DATE. The deletion date displays in the yymmdd format.

Variable field

The special message workform contains one variable field, MESSAGE. A start-of-message symbol (►) precedes the field and a field terminator (¶) completes it.

MESSAGE — This variable length element contains the message input by the dispatching library. The message must not exceed ten lines of CRT screen display.

```
►SM#          SENDER          RECIPIENT:    DATE:          DELDATE:    ¶
►MESSAGE:     ¶
```

(a)

```
►761000  SENDER: ocl RECIPIENT: oun DATE: 760220 DELDATE: 760227    ¶
►MESSAGE: please cancel loan request for ILL# 7610001.  Thank you.  ¶
```

(b)

Fig. 3 (a) Special Message Workform and (b) Workform as Completed by ILL Participant.

B. Creation of Special Messages

After logging in to the ILL subsystem, the operator enters 'wfb' in the Home position and depresses the DISPLAY REC'D and SEND keys. The system responds by displaying the special message workform (see above).

The operator completes the workform by inputting fixed field element RECIPIENT and variable field MESSAGE.

To input data in the fixed field element, the operator places the cursor in the space to the right of element RECIPIENT and enters the three-character OCLC symbol of the receiving library. The operator sends the fixed field to the computer by advancing the cursor to the line below the just completed line and depressing the SEND key. When the computer has accepted the element, it will respond:

RECIPIENT added.

To enter the message, the operator places the cursor to the right of element MESSAGE, depresses the INSERT key to place the terminal in the Insert Mode, and types in the message. The operator should not exceed the ten-line maximum input for the MESSAGE element. The operator then advances the cursor to the line below the field terminator and depresses the SEND key to send the message to the computer. When the computer has accepted the field it will respond:

Message added.

The operator dispatches the special message by depressing the PRODUCE and SEND keys.

C. Error Checking of Special Messages

The system checks the fixed field elements for illegal data and variable field elements for data which exceeds maximum input length.

Fixed field

In element RECIPIENT, the system accepts a three-character OCLC symbol of a participating library. If the operator sends an invalid code, the computer inserts three fill characters in element RECIPIENT and responds, "Illegal code." The system will not permit the operator to dispatch the special message until the operator has re-input and sent an acceptable OCLC code to the computer. The system

responds, "Request impossible" if the operator attempts to dispatch a special message which contains fill characters.

The computer does not permit the operator to change the system-supplied elements SM#, SENDER, DATE, and DELDATE. The computer responds, "Request impossible" if the operator sends a change to one of these elements and returns the screen to its original appearance after a reformat.

Variable field

The system truncates the information entered in field MESSAGE if it exceeds the ten-line maximum allowable input and responds with the message, "Data truncated." The operator should examine a truncated field before he dispatches the message; however, the system does not require the operator to edit and re-send this field before he dispatches the message.

D. Deletion of Special Messages

System deletion

Special messages are deleted from the system seven calendar days following the dispatch date (fixed field element DATE). The system deletion date displays in fixed field element DELDATE on the Special Message Workform.

Recipient

To delete a special message, the receiving library retrieves the message from the Message Waiting File, enters "del" in the Home position and depresses the UPDATE and SEND keys. When the system accepts the transaction, it responds with the special message control number of the deleted message. For example:

SM# 76123456 deleted.

Although the system provides automatic deletion, recipients of special message are encouraged to delete those messages which are no longer useful. A special message which is not deleted remains in the recipient's Message File until the DELDATE arrives. This may cause the library to re-examine previously completed messages which were not deleted.

Dispatching library

The library which dispatches a special message may delete that message if the receiving library has not

retrieved it from the Message Waiting File. Once the recipient has retrieved the message, the system does not permit the dispatching library to cancel it and responds, "Request impossible" to a deletion request.

The system permits the dispatching library to delete a special message which has not been retrieved by the receiving library. To delete the special message the operator retrieves the message, enters "del" in the Home position and depresses the UPDATE and SEND keys. When the system has accepted the transaction it responds with the special message control number of the deleted message. For example:

SM# /61245 deleted.

IX. SYSTEM ERROR CHECKING

The ILL subsystem checks for the following types of operator errors:

1) illegal dates
2) data exceeding maximum length
3) illegal transactions

A. Illegal Dates

The system checks the following user input date elements, EXP, RETRY, DUEDAT, REC'D, RTNDAT, ERTDAT, RENEWL, RENDAT, DATSHP, ESTDEL, and CLRD for valid data.

Dates that are entered in the yymmdd format must contain six digits and represent a valid date. Erroneous dates include those not represented by a calendar day such as 30 February 1976 (760230) or digits which represent an elapsed date such as 7 January 1966 (660107).

Dates entered as a number of days must be entered as a one-, two- or three-digit number preceded by a plus sign.

With the exception of date elements, DUEDAT (none), RENEWL (any), and RENDAT (no), the system will not accept alphabetic characters in any of the above date elements.

If the operator sends an illegal date element to the computer, the system will replace the erroneous date with six fill characters and display the message "Illegal data."

The system does not permit the operator to dispatch a Loan Request or Response which contains fill characters. The operator must complete the elements with acceptable data.

B. Exceeded Input Length

In order to retain the format of the Request and Response Forms, the system will not accept any element longer than the number of spaces displayed between the mnemonic tags. Except in data elements AUTHOR, TITLE and IMPRNT, the system deletes the characters that overflow the allocated space but does not respond with an error message.

If data input by the operator or supplied by the system exceeds the maximum input length in data

elements AUTHOR, TITLE, or IMPRNT, the system deletes the excess data, places an asterisk and a fill character as the last elements of the truncated data, and returns the error message:

Data truncated.

The system does not permit the operator to update or send an ILL request which contains any fill characters. The operator must delete the fill character and resend the data element to the computer before updating or dispatching the loan request.

The asterisk is intended to notify the lending library which of the above data elements, the AUTHOR, TITLE, or IMPRNT, was abbreviated to fit within the maximum input limit.

C. Illegal Transactions

The system prevents the borrowing library from changing elements entered by the other libraries and also elements controlled by the system. If a library sends a change to a system-controlled element or to an element which may only be changed or added by the other library, the system re-displays the element as it originally appeared before the change and responds:

Request impossible.

The chart below lists the elements that may be input or edited by the respective lending or borrowing libraries and those that are exclusively system-controlled and may not be changed by either library.

Borrowing Library	Lending Library	System Controlled
EXP	WILSUP	ILL#
L1	RETRY	BI
AUTHOR	DUEDAT	OCLC#
TITLE	CALLNO	REQDAT
IMPRNT	RENTAT	STATUS
ED	COST	
VOL	LIFUND	
ARTL	CHGBI	
DATE	LNRSTR	
PAGES	NOTES (Res. form)	
NO	DATSHP	
VERIFY	ESTDEL	
NOTES (Req. form)	VIA	
MAXCST	INSUR	
SHPVIA	RETNIN	
BIFUND	RETNTO	
PATRON	CLRD	
SHPTO		
BILLTO		
REC'D		
RTNDAT		
ERTDAT		
VIA		
INSUR		
RENEWL		

D. Multiple Errors

Due to the system's design which allows the operator to send multiple data elements to the computer, it is also possible that more than one data element may contain input errors, illegal data,or illegal transaction levels.

When the operator sends multiple data elements which contain errors to the computer, it will respond with the general error message, "Errors in data" and supply the appropriate error indicators, fill characters or asterisks. The operator should examine the ILL record and make the necessary corrections.

Request (Filled in by Borrowing Library)

ILL#: 761001 BI: ocl OCLC#: 185738 REQDAT: 760219 EXP: 760320
WILSUP: RETRY: DUEDAT: STATUS:
LI: oun

CALLNO:
AUTHOR: Calderon de la Barca, Frances Erskine (Inglis)
TITLE: Life in Mexico, during a residence of two years in that country
IMPRNT: Mexico, Ediciones Tolteca, 1952
ARTL:
DATE: PAGES: NO. VERIFY: OCLC+

NOTES:

MAXCST: 5.00 SHPVIA: ups BIFUND: 76/77 ocl
PATRON: Smith, Stan
SHIPTO: The Ohio College Library Center/1125 Kinnear Rd./Columbus, Ohio 43212

BILLTO:

REC'D: RTNDAT: ERTDAT: VIA:
INSUR:

RENEWL: RENDAT:

Response (Filled in by Lending Library)

ILL#: 761001 BI: ocl OCLC#: 185738 REQDAT: 760219 EXP: 760320
WILSUP: yes RETRY: DUEDAT: 760325 STATUS:

COST: LIFUND:
CHGBI:
LNRSTR:

NOTES:

DATSHP: ESTDEL: VIA: INSUR:
RETNIN:

RETNTO:

RENDAT: CLRD:

Fig. 4. Examples of ILL Request and Response Forms (Monograph).

Request (Filled in by Borrowing Library)

```
ILL#: 761000          BI: ocl          OCLC#: 1755854  REQDAT: 760219 EXP:
WILSUP:               RETRY:           DUEDAT:         STATUS:
LI: cwr, yng, ned

CALLNO:
AUTHOR:
TITLE: Library journal.
IMPRNT: New York, R.R. Bowker Co.                              ED:          VOL: 98
ARTL: Donald J, Sager/Mobile and the Cable.
DATE: 19730215   PAGES: 501-4          NO: 4       VERIFY: OCLC+

NOTES:

MAXCST: 5.00      SHPVIA: 1st          BIFUND: 76/77 ocl
PATRON: Jones, John J.
SHIPTO: The Ohio College Library Center/1125 Kinnear Rd./Columbus, Ohio 43212

BILLTO: same

REC'D             RTNDAT:              ERTDAT:         VIA:
INSUR:

RENEWL:                                RENDAT:
```

Response (Filled in by Lending Library)

```
ILL#: 761000          BI: ocl          OCLC#: 1755854  REQDAT: 760219 EXP: 760320
WILSUP: yes           RETRY:           DUEDAT: none    STATUS: SHIPPED

COST: 3.00                             LIFUND: 76/77 cwr ILL fund
CHGBI: 1.50
LNRSTR:


NOTES:


DATSHP: 760222        ESTDEL: 760226   VIA: 1st            INSUR:
RETNIN: photocopy  -  do not return.


RETNTO:


RENDAT:               CLRD:
```

Fig. 5. Examples of ILL Request and Response Forms (Serials).